



**UNITED WAY OF CENTRAL TEXAS**

Campaign Champion's

# ACTION GUIDE



**CHANGE DOESN'T  
HAPPEN ALONE.**

**LIVE UNITED**

**United  
Way**



**United Way of  
Central Texas**



## DEAR CAMPAIGN CHAMPION,

I am honored and proud to have served as the 2018-19 United Way of Central Texas Campaign Chair. Thank you to the Bell County citizens and community leaders who have provided their leadership, numerous volunteer hours, and financial donations to help sustain the United Way programs.

United Way cares about the individuals living in Central Texas and leverages the work of many non-profit agencies, experts, and volunteers to offer quality health and human support services to our community.

As we embark on this year's campaign, I encourage all of the citizens, businesses and community leaders in the Bell County area to help support our local United Way. Funds are used to assist our neighbors not only when the need arises but to help gain access to education, health and financial stability. I sincerely thank the incredible staff for being the game change makers and to everyone for doing their part to help make

United We Fight, United We Win.  
 Eric Tovar  
 Belton H-E-B Unit Director  
 Central Texas Region  
 2018-19 UWCT Campaign Chairman



# MAKE A BIGGER IMPACT

LIVE UNITED

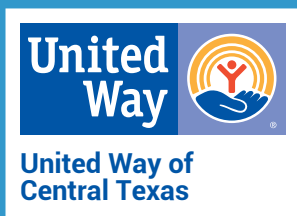
Campaign Champions are the critical link between United Way of Central Texas and the employees of our corporate partners that help us make East Bell County greater.

## IN THIS GUIDE, YOU WILL FIND:

- Step-by-step instructions on planning every aspect of your campaign, from the logistical to the fun
- Ideas and tips to make your campaign more engaging for all employees
- Links to additional resources that will help you plan your campaign

We hope you will use this guide as a go-to resource for your campaign needs, but a guide can only do so much. UWCT staff are available to help with the rest, so please reach out to us anytime.





**UNITED WE FIGHT.  
UNITED WE WIN.**

**CHANGE DOESN'T HAPPEN ALONE**



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**United Way of  
Central Texas**



LIVE UNITED

# UNITED WAY OF CENTRAL TEXAS

## OUR VISION:

United Way of Central Texas is fighting for the health, education, and financial stability of every person, in every community throughout East Bell County.

United We Fight. United We Win.

## OUR MISSION:

**To improve lives across our diverse communities by:**

- Prioritizing needs in health, education, and financial stability
- Forming innovative and effective partnerships with other organizations
- Strategically raising and investing resources to make lasting change



/UWCTX



@uwct



uwct

uwct.org

## WHAT WE WANT TO COMMUNICATE:

- We are improving lives across our diverse community
- United Way fights for the health, education, and financial stability of every person in East Bell County
- We raise money locally and invest locally
- We help East Bell County's working families and individuals
- We are results-driven and research-based
- We create opportunities for anyone to be a philanthropist



# WORKPLACE GIVING

## ANNUAL EMPLOYEE CAMPAIGN

It feels good to be part of the solution. When you hold a United Way Campaign at your workplace, you are opening your employees and co-workers to easy ways they can make a difference like donating through payroll deductions, participating in special events, or volunteering with one of our community partners.



## BENEFITS OF BEING A CAMPAIGN CHAMPION:

- You are recognized as a leader in your organization.
- You develop your leadership, project management, and public speaking skills.
- You make a personal investment in your community, learning how issues are addressed.
- Wide visibility of your project management skills throughout the organization.
- Awareness of your direct impact to the community.



# CAMPAIGN CHAMPION ROLE & RESPONSIBILITIES

## WHAT ARE YOUR RESPONSIBILITIES AS A CAMPAIGN CHAMPION?

- ▶ Become a United Way Cheerleader In Chief at your worksite.
- ▶ Become knowledgeable about United Way of Central Texas and educate your co-workers.
- ▶ Schedule a planning meeting with United Way staff to develop an effective campaign plan and goal.
- ▶ Recruit and coordinate a team of company volunteers to assist you with the campaign.
- ▶ Share your campaign plan and goal with the CEO or senior decision-maker, getting his or her approval and ensuring support of the campaign.
- ▶ Coordinate your company's kick off, special fundraising events, recognition events, and distribution and collection of campaign materials and pledge forms.
- ▶ Promote the campaign throughout your organization and give everyone the opportunity to give.
- ▶ Encourage leadership giving in your campaign (we'll give you more details about this later in this guidebook).
- ▶ Monitor campaign progress, and push routine updates to your team via email, intranet sites, newsletters, and other communications vehicles to which you have access.
- ▶ Keep your CEO or senior decision-maker updated on campaign progress. Submit pledge forms and complete final United Way report form.
- ▶ Say thank you to everyone at your company for their help and participation.
- ▶ Have fun and feel good about the work you are doing for the community. Commit to debriefing after the campaign to identify successes and areas for improvement.



# BEST PRACTICES

## #1 EDUCATE YOURSELF ABOUT UWCT

**The more you know about United Way and running a campaign, the more successful you will be promoting your campaign, communicating the mission of United Way, and leading your team.**

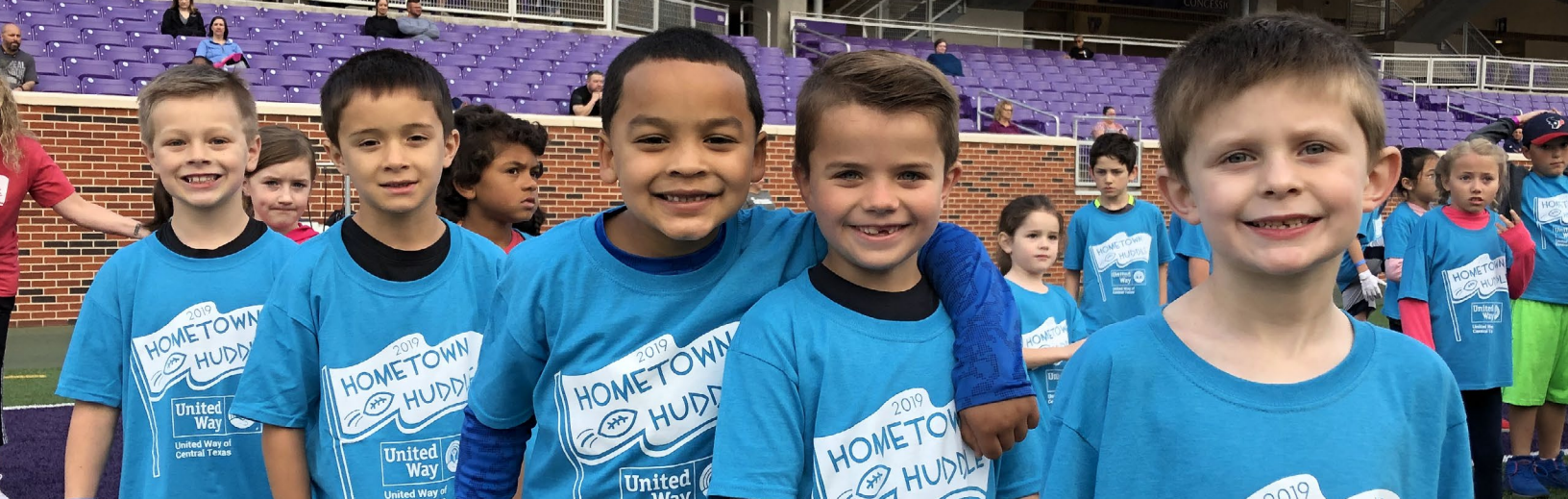
- Attend Campaign Champion Training
- Keep this Guide and refer to it often
- Bookmark our website (UWCT.org)
- Follow us on social media for real-time updates



## #2 RECRUIT & TRAIN YOUR CAMPAIGN COMMITTEE

**Don't run your campaign alone. Recruit a committee of enthusiastic, resourceful, and committed employees to help you plan the best possible campaign!**

- Diversity is important. Involve representatives from various departments in your organization, such as marketing, communications, human resources, payroll, etc.
- Set up regular committee meetings and delegate responsibilities. You can ensure campaign success by creating roles and responsibilities for committee members, such as marketing and events, campaign communication, department liaison, payroll contact, etc.



## #3 SECURE EXECUTIVE OR TOP-LEVEL SUPPORT

The success of your campaign depends on top-down support, particularly the commitment and involvement of your CEO and executives.

Securing the visible support of your leaders and management streamlines and adds momentum to the planning process. This will have a big impact on your ability to successfully achieve your campaign goals.



## #4 DEVELOP A CAMPAIGN PLAN

- Set a challenging, yet attainable goal.
- With the campaign committee, lay out the campaign plan and employee engagement calendar.
- Share the tasks so everyone is contributing to the campaign events and the workload is evenly distributed.





## #5 PROMOTE AND PUBLICIZE YOUR CAMPAIGN/ACTIVITIES

You and your committee can be creative in generating publicity and creating excitement and interest. You know your environment the best and what will be most effective for your culture.

Campaigns with great visibility encourage everyone to take part in them. Consider using email, intranet sites, personalized letters, pay stub inserts, and UWCT materials to promote the campaign.

Hang posters and flyers in prominent places like lobbies, kitchens/lounges, and elevators to announce the UWCT campaign dates and important information.

**Contact your United Way rep to order these UWCT materials:**

- ▶ Brochures
- ▶ Posters
- ▶ Pledge Forms
- ▶ UWCT Videos
- ▶ UWCT Giveaways/ Prizes
- ▶ Online Materials
- ▶ Articles
- ▶ Slides for common area monitors

## #6 PROMOTE LEADERSHIP GIVING

**Leadership donors contribute \$500 or more annually to United Way.**

- Ask your CEO to appoint an executive who will lead the Leadership Giving Campaign.
- Set a meeting designed to educate upper management and organizational leaders about the benefits of giving at the Leadership Giver level.
- Encourage and incentivize the management team to participate.
- Promote affinity groups and events



## #7 PLAN AND IMPLEMENT A GREAT KICKOFF EVENT

A kickoff event is a very successful way to communicate a consistent message to your employees about the needs in the community and services United Way helps provide. Your kickoff event can help generate enthusiasm and support for the campaign.

- ▶ Make sure your CEO and senior management can attend.
- ▶ Kick the campaign off at an all staff meeting already on the calendar (this prevents employees from having to attend an additional meeting or rearrange their schedules).

## #8 VOLUNTEER

Create an employee volunteer group to see how your contributions make a difference in the community while giving employees a sense of ownership and building morale. Get connected to opportunities by signing up on our website at [UWCT.org/nonprofit-connection/volunteer](http://UWCT.org/nonprofit-connection/volunteer)

- ▶ Use the themes CHANGE DOESN'T HAPPEN ALONE and LIVE UNITED; educate your peers by showing the United Way video, inviting United Way partner agency speakers, and having your management representatives endorse the campaign.
- ▶ If your company has multiple shifts, make sure to plan a kickoff for other shifts, too (United Way staff is happy to help – no matter what time of the day!)
- ▶ At the kickoff, you may wish to distribute promotional items such as pens, coffee mugs, balloons or other items. Many companies order a few items and distribute through a prize drawing during the event.





## #9 MAKE THE ASK

Do you know why most people do not give to United Way? Because they were never asked. Most people are generous and want to give, so ask them to donate and make it an easy process.

## #10 WRAP UP THE CAMPAIGN

Totaling the results and completing the report form is the final stage of your campaign. Ask UWCT staff any questions you have about finalizing your report. It is important to update your employees all year about how their dollars are helping in the community.

## #11 YEAR-ROUND ENGAGEMENT

UWCT is able to tailor options to support your company's employee engagement and corporate social responsibility objectives by year-round community engagement:

- ▶ Volunteer activities
- ▶ In-kind donation drives:
  - school supplies, hygiene kits, summer fan drives, etc.
- ▶ United Way partner agency tours
- ▶ UWCT Day of Caring





# CAMPAIGN AID

## VOLUNTEER ACTIVITY

**P**romoting employee volunteerism boosts staff morale and deepens the philanthropic commitment among your employees. UWCT can provide a menu of volunteer opportunities throughout the year, as well as manage all project logistics.

By doing so, your company's volunteer engagement leaders can enjoy the benefit of minimal disruptions to your day-to-day work responsibilities. Volunteer activities can take place on-site or in community based locations.

## CAMPAIGN CHECKLIST

### BEFORE THE CAMPAIGN

- ☐ Meet with your United Way representative
- ☐ Attend the Campaign Coordinator Training
- ☐ Secure CEO/Senior Management Support
- ☐ Review Campaign history and set your goals
- ☐ Recruit a campaign committee to help with the campaign
- ☐ Determine your campaign plan, timeframe, and any incentives
- ☐ Gather your campaign communications and any campaign materials
- ☐ Schedule your kick-off, United Way speakers, and any special events
- ☐ Promote the campaign with an announcement

### DURING THE CAMPAIGN

- ☐ Distribute pledge forms and campaign materials to every employee
- ☐ Set goal of 100% ask rate
- ☐ Promote the campaign, kick-off, and special events through numerous channels
- ☐ Hold a mid-campaign committee meeting to review the progress towards the goal
- ☐ Send regular progress reports to employees
- ☐ Follow-up with individuals who have yet to turn in their pledge form
- ☐ Send reminders about campaign events, incentives, and deadlines
- ☐ Avoid leaving pledge cards in mailbox or on a desk without making an individualized ask

### AFTER THE CAMPAIGN

- ☐ Collect all pledge forms and campaign material
- ☐ Schedule a time with your United Way representative to complete the paperwork
- ☐ Take care of any corporate contributions or matches on employee giving
- ☐ Send a thank you letter to everyone including the campaign committee and the CEO
- ☐ Publish a short story, photo, and the results of your campaign in the company newsletter
- ☐ Hold a post campaign committee meeting to evaluate the challenges and successes of the campaign.  
(Keep the notes handy for next year!)
- ☐ Talk to your United Way representative so that we can continue to improve our service

### YEAR ROUND

- ☐ Keep employees updated on activities of United Way
- ☐ Promote volunteer opportunities to employees

# SET A CHALLENGING YET ATTAINABLE GOAL

LIVE UNITED

## ACCESS 2018 DATA

Employee giving total:

Leadership giving (\$500+ annually):

# of Employees

# of Donors

# of Leadership  
Givers

**Employee Participation** (total # of donors divided by total # of employees)

**Previous 3-year giving totals:**

2016:

2017:

2018:

**Difference year-to-year:**

2016 to 2017 %

2017 to 2018 %

## IDENTIFY POTENTIAL

Average gift \$ x # of new donors =  
TOTAL increased participation:

# of new Leadership Givers X \$500 =  
TOTAL leadership increase:

## IDENTIFY GROWTH

Does your company offer a corporate match for employee donations? If so, what are the guidelines? Does your company offer **sponsorships, grants, or other corporate gifts**? You may want to consider these types of questions when working to increase corporate support for United Way of Central Texas.

## CALCULATE YOUR 2019-2020 GOAL

2018 Total Employee Giving  
+ Potential growth based on new donors  
+ Potential growth based on new Leadership Givers  
+ Potential company gifts

**TOTAL**





# THANK YOU!

## ADDITIONAL RESOURCES

### Your United Way Team

United Way of Central Texas staff is here to help you energize, engage, and inspire employees throughout your campaign. They are your greatest resource and are an important part of your TEAM. Contact us for help with your questions, scheduling speakers, developing customized volunteer experiences, and implementing new campaign strategies.

### United Way Website

Visit [UWCT.org](http://UWCT.org) to learn about our work and to download campaign materials, beneficiary stories, photos, and other campaign tools.

### United Way Annual Report

Make sure everyone you are asking to support United Way receives this report. The United Way Annual Report provides an overview of our goals, statistics on community needs, descriptions of our services, and more.

### Campaign Champion Manual

To energize and educate your committee and campaign team, equip them with this useful guide.

### Campaign Toolkit

Flyers, brochures, and logos are available for UWCT workplace campaign marketing at your office. Visit [UWCT.org/campaign-toolbox](http://UWCT.org/campaign-toolbox) to download resources.

### United Way Video

Share UWCT's video to help your colleagues understand the breadth and impact of United Way's work. The videos featuring the stories of individuals who have been helped by United Way are another great tool to educate and inspire.



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